



HUMAN RESOURCES DEPARTMENT

City of Burlington

131 Church Street, Burlington, VT 05401

Voice (802) 865-7145
Fax (802) 864-1777
TTY (802) 865-7142

MEMO

TO: Board of Finance

FROM: Stephanie Hanker, Human Resources Generalist
Susan Leonard, Human Resources Director

DATE: December 12, 2012

RE: Recommendation – Step placement for Julie Laplume, Senior Accountant

I respectfully request approval for the recommend step placement of Julie Laplume, incumbent for the position of Senior Accountant, Grade 18 in the Willis Classification System, pursuant to Section 5.4 Compensation Plan, subsections A. Placement, of the City of Burlington Comprehensive Personnel Policy Manual, which states: "To the extent that previous relevant experience equals or exceeds the necessary knowledge and skills, job duties and responsibilities of the position being sought, those specific and relevant years of experience (less the minimum number of year of experience required in the position description) may be converted to additional steps at a 2:1 ratio, up to a maximum of step seven (7)".

The minimum qualifications for the position require a minimum of three (3) years of relevant as well as a Bachelor's degree or equivalent. Mrs. Laplume possesses a total of 13 years of relevant experience in accounting. In addition to her experience Mrs. Laplume is a Certified Public Accountant, Certified Internal Auditor, Certified Financial Examiner and a Chartered Global Management Accountant.

Based on these qualifications, pursuant to Section 5.4(a) of the City of Burlington's Personnel Policy Manual, Mrs. Laplume is eligible for placement at a step seven (7). This equates to a salary of \$55,970.03 per year. Mrs. Laplume will be replacing a prior employee who was budgeted at a Grade 18 step 7; therefore, no additional funds are being requested. This annual amount is derived from the FY13 Non-Union Pay scale. This request does not represent a change to the organizational chart for the department.

Attached are Mrs. Laplume's resume and the job description of Senior Accountant.

Thank you for your consideration.

The City of Burlington does not discriminate on the basis of political or religious affiliation, race, color, national origin, age, sex, sexual orientation, marital status, veteran status or disability.

The City is also committed to providing proper access to services, facilities, and employment opportunities. For accessibility information or alternative formats, please contact Human Resources Department at 865-7145.

JULIE M. LAPLUME, CIA, CPA, CFE, CGMA

109 Aspen Lane
Williston, Vermont 05495
Cell: (802) 355-7457
E-mail: jlaplume@msn.com

PROFESSIONAL EXPERIENCE:

2007 to Present ANGOLANO & COMPANY – Shelburne, VT

A family owned firm founded in 1981 providing small businesses with accounting, tax, and management support and individuals with financial and tax planning.

Auditor / Tax Preparer (2007 to Present)

Responsibilities include audit, review, and compilation fieldwork for school districts, towns, not for profit organizations, and various businesses located throughout Vermont. Perform substantive and analytical testing of accounts, review balance sheet reconciliations and accruals for accuracy, and prepare financial statements. Identify deficiencies in operations, inform management of the deficiencies noted, and provide recommendations to resolve them. Prepare and file S corporation, C corporation, partnership, and individual income tax returns.

2006 to 2007 VISITING NURSE ASSOCIATION OF CHITTENDEN & GRAND ISLE COUNTIES, INC. – Colchester, VT

A non-profit organization, in existence for over 100 years, offering adult home health, long term care, as well as maternal and child health services to the community.

Financial Analyst (2006 to 2007)

Responsibilities included preparation of bank reconciliations, journal entries, gift annuity accounting transactions, and work papers as well as maintenance of the general ledger and fixed assets systems/schedules. Uploaded and interfaced payroll expenses, payroll accruals, and revenue from Microsoft Excel to the general ledger system. Processed bi-weekly employee contributions as well as calculated and processed quarterly employer contributions to the 403(b) pension plan. Maintained budget data as well as interfaced budget allocations from Microsoft Excel to the general ledger system. Prepared and provided financial reports to Management as requested.

2005 to 2005 MARSH MANAGEMENT SERVICES INC. – Burlington, VT

A leading risk and insurance services firm that provides global risk management, risk consulting, insurance broking, financial solutions, and insurance program management services, inclusive of captive insurance management services.

Account Manager (2005)

Responsibilities included supervising daily accounting activities as well as preparing and reviewing financial statements, supporting documentation, and regulatory filings. Functioned as the primary liaison with clients and service providers. Coordinated and monitored client activities, regulatory examinations, audits, and actuarial studies to ensure compliance with applicable laws and regulations. Coordinated and participated in Board of Directors' and other client meetings.

PROFESSIONAL EXPERIENCE (continued):

2000 to 2005 STATE OF VERMONT, DEPARTMENT OF BANKING, INSURANCE, SECURITIES, AND HEALTHCARE ADMINISTRATION – Montpelier, VT
A section within the State of Vermont government that regulates the largest captive insurance domicile in the United States and the third largest domicile in the world.

Insurance Examiner – Captive Insurance Section (2000 to 2005)

Responsibilities included training and supervising personnel as well as directing regulatory examinations of captive insurance companies domiciled within the State of Vermont. Reviewed all aspects of company operations and practices including its management, capital structure, corporate records, business in force, underwriting experience, loss experience, insurance and reinsurance, accounts and records, treatment of policy holders, policy forms, financial statements, assets, liabilities, surplus, income, and expenses. Prepared regulatory examination reports in accordance with the National Association of Insurance Commissioners' guidelines for examinations, indicating any violations of insurance laws and regulations discovered during any examination. Reviewed audit working papers, performed surveillance procedures for various risk retention groups, and represented the Department when performing underwriting and claims testing at various locations throughout the United States and Bermuda.

EDUCATION:

UNIVERSITY OF VERMONT (UVM) – Bachelor of Science, May 1995
Major: Business Administration with a double concentration in Accounting and Human Resource Management
Awards: Who's Who Among Students in American Universities and Colleges
The Ann C. Livingston Award

CHAMPLAIN VALLEY UNION HIGH SCHOOL – Diploma, June 1991

Awards: Denise Wright Memorial Award
International Cheese Company Scholarship
Robert Pepper Memorial Award

PROFESSIONAL CERTIFICATION:

Certified Internal Auditor (CIA) – State of Vermont. Certificate No. 26532
Certified Public Accountant (CPA) – State of Vermont. Certificate No. 1578
Certified Financial Examiner (CFE) – State of Vermont. Certificate No. CF-14035
Chartered Global Management Accountant (CGMA) – State of Vermont. Certificate No. 110021925
Chartered Property Casualty Underwriter (CPCU) – Passed four of the eight examinations required to obtain this designation.

PROFESSIONAL AFFILIATIONS:

Member, The Institute of Internal Auditors
Member, The Vermont Society of Certified Public Accountants
Member, American Institute of Certified Public Accountants
Member, Society of Financial Examiners

SKILLS: Skilled in CS Accounting, Engagement CS, Ultratax, Microsoft Excel, and Microsoft Word

City of Burlington Job Description

Position Title: Senior Accountant

Department: Clerk Treasurer

Reports to: Chief Accountant

Pay Grade: 18

Job Code: 325

Exempt/Non-Exempt: Exempt

Union: N/A

General Purpose:

Provides senior level accounting services, including supervision, in support of the City's central accounting function. Position may also provide accounting services to several other major City Departments, including Burlington International Airport and Burlington Telecom.

Essential Job Functions:

- Performs and/or supervises accounting duties such as the preparation of journal entries, bank statement reconciliation, general ledger account reconciliation and billing, including but not limited to, payroll, accounts payable, revenue collection, work order accounting and fixed asset accounting.
- Supervises, evaluates and trains appropriate fiscal and clerical staff necessary to carry out the above duties.
- Assists in the preparation of the City's budget.
- Assists in the development and maintenance of appropriate accounting standards and procedures in accordance with Generally Accepted Accounting Principles (GAAP) and other regulatory guidelines and requirements.
- Assists with audits including, but not limited to, the reconciliation of assigned general ledger accounts producing schedules and documentation as well as responding to auditor inquiries.
- Performs and/or oversees the development and reporting of the City's cost allocation plan and capital assets as well as assists with rate design studies and maintains equipment inventory systems.
- Prepares reports, including but not limited to, Capital Improvements, reconciliations, and periodic budget reports.
- Assists in the processing, checking and posting of transactions associated with the City's fiscal and accounting functions.

Non-Essential Job Functions:

- Performs related work as may be required.

Qualifications/Basic Job Requirements:

- Bachelor's Degree in Accounting, Business Administration, or related field and three years of relevant experience in accounting; or An Associate Degree or equivalent state testing in accounting and five years of relevant accounting experience; or an equivalent combination of education and experience.
- Minimum of two years supervisory experience preferred.
- Thorough knowledge of general accounting principles and practices required.
- Working knowledge of computerized accounting systems including the ability to operate spreadsheets, word-processing, and database software in a Windows based environment.
- Knowledge of applicable State and Federal guidelines for telecommunication, Federal Airport Grants, and applicable payroll/income tax rules preferred
- Ability to delegate, direct and review the work of subordinate staff and the ability to train associates in accounting practices and procedures.
- Must be consistent and accurate.
- Ability to work well under pressure and appropriately deal with stress.
- Ability to communicate effectively both orally and in writing with City management and departmental staff.
- Ability to establish and maintain good relations with co-workers.
- Ability to meet schedules and deadlines while working with minimal supervision.

Physical & Mental/Reasoning Requirements: Work Environment:

These are the physical and mental/reasoning requirements of the position as it is typically performed. Inability to meet one or more of these physical or mental/reasoning requirements will not automatically disqualify a candidate or employee from the position. Upon request for a reasonable accommodation, the City may be able to adjust or excuse one or more of these requirements, depending on the requirement, the essential function to which it relates, and the proposed accommodation.

☒ seeing
☐ color perception
 (red, green, amber)
☒ hearing/listening
☐ clear speech
☒ touching
 ☒ dexterity
 ☒ hand
 ☒ finger
☐ reading - basic
☒ reading - complex
☐ writing - basic
☒ writing - complex

☒ ability to move distances
 within and between
 warehouses/offices
☐ climbing
☐ ability to mount and
 dismount forklift/truck
☐ pushing/pulling

☐ math skills - basic
☒ math skills - complex
☐ clerical

☒ lifting (specify)
 30 pounds
☒ carrying (specify)
 30 pounds
☐ driving (local/over
 the road)

☒ analysis/comprehension
☒ judgment/decision
 making

<input type="checkbox"/> shift work	<input type="checkbox"/> outside	<input type="checkbox"/> pressurized equipment
<input checked="" type="checkbox"/> works alone	<input type="checkbox"/> extreme heat	<input type="checkbox"/> moving objects
<input type="checkbox"/> works with others	<input type="checkbox"/> extreme cold	<input type="checkbox"/> high places
<input type="checkbox"/> verbal contact w/others	<input type="checkbox"/> noise	<input type="checkbox"/> fumes/odors
<input checked="" type="checkbox"/> face-to-face contact	<input type="checkbox"/> mechanical equipment	<input type="checkbox"/> hazardous materials
<input checked="" type="checkbox"/> inside	<input type="checkbox"/> electrical equipment	<input type="checkbox"/> dirt/dust

Supervision:

Directly Supervises: 2-6

Indirectly Supervises: 1-3

Disclaimer:

The above statements are intended to describe the general nature and level of work being performed by employees to this classification. They are not intended to be construed as an exhaustive list of all responsibilities, duties and/or skills required of all personnel so classified.

Approvals:

Department Head: _____ Date: _____

Human Resources: _____ Date: _____

(revised February 2011)



OFFICE OF THE CLERK/TREASURER
City of Burlington

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TO: Human Resources

FROM: Rich Goodwin – Assistant CAO for Finance and Management

DATE: December 11, 2012

RE: Recommendation Step placement for Julie Laplume

Please review the forwarded resume of Julie for step placement as allowed under the City of Burlington's Personnel Policy.

In keeping with the job requirements, she has a Bachelor of Science in Business Administration with dual concentrations in Accounting, and Human Resources Management from the University of Vermont.

Julie has over 15 year's quantifiable accounting experience, and has direct experience auditing the books for City Municipalities, as well as, being a Certified Public Accountant.

I believe Mrs. Laplume is an excellent candidate for this position and the City of Burlington will benefit from the many years of direct experience she holds.

With her qualifications, I would like to offer Julie the maximum number of steps allowable under the Personnel Policy.

Thank you for your consideration.

Rich Goodwin